

Parks and open spaces: Towards An Excellent Service

5. Guidance on TAES Planning and Scoping

Supported by:



1 Introduction

1.1 This document will assist parks and open spaces organisations to:

- develop a clear scope for the TAES Self-Assessment and improvement activity
- develop clear plans and methodology for the TAES Self-Assessment and improvement activity

1.2 Experience has shown that taking the time to develop clear scope and plans not only makes the self-assessment more effective, it also saves a considerable amount of time.

1.3 This guidance is not mandatory; it merely reflects good practice.

2 Planning the process

1.1 The organisation should identify a person to plan and coordinate the TAES Self Assessment and improvement planning process. This person should develop a project plan in discussion with other leaders.

1.2 The starting point is to arrange a session to brief relevant parks and open spaces leaders, including the elected members, on the concepts of TAES Self-Assessment and improvement. These leaders will become TAES 'champions' and will provide vital support and impetus for improvements.

1.3 This should be followed by a session to establish the scope of the self-assessment and to identify the self-assessment team (see section 3 on establishing the scope).

1.4 The self-assessment method should be discussed and clearly established. At its simplest the self-assessment will involve a small team working through each theme. It may be that different teams are invited to carry out an assessment and that these are then brought together to create a composite view. Alternatively different teams could be invited to assess specific themes, which could then be brought together..

1.5 The means of collecting evidence should be planned – particularly the process of obtaining feedback from core staff, partners and customers where this is not already

available (see section 5 on collecting the evidence). Critical information should be available in an easy-to-understand format at the self-assessment sessions.

- 1.6 The number, timing, dates and content of self-assessment sessions should be planned, ensuring that the process is not too time-consuming and that energy, momentum and involvement are maintained throughout. It is recommended that each session last between three and four hours. Experience has shown that TAES Self-Assessment for parks and open spaces organisations should take approximately 12 hours (eg, four sessions of three hours each) and should be completed within three weeks. This timescale also helps to focus the team on high-level approaches (there is no time for trivia). These sessions need to be planned into everyone's diaries. It is essential that all team members are able to attend.
- 1.7 A separate session (normally half a day) should be arranged for improvement planning. It is recommended that the self-assessment team carries out the improvement planning in order to maintain ownership.
- 1.8 TAES Self-Assessment and improvement planning is designed to be an annual cycle. The organisation should plan, agree and document a process for future self-assessment, along with interim reviews of improvement progress (eg, quarterly).

3 Establishing the scope

- 3.1 This version of TAES is designed specifically for parks and open spaces as defined in Planning Policy Guidance Note 17: 'Planning for open space sport and recreation':
 - i. parks and gardens – including urban parks, country parks and formal gardens
 - ii. natural and semi-natural urban green spaces – including woodlands, urban forestry, scrub, grasslands (eg, downlands, commons and meadows), wetlands, open and running water, wastelands and derelict open land and rock areas (eg, cliffs, quarries and pits)
 - iii. green corridors – including river and canal banks, cycleways, and rights of way
 - iv. outdoor sports facilities (with natural or artificial surfaces and either publicly or privately owned) – including tennis courts, bowling greens, sports pitches, golf courses, athletics tracks, school and other institutional playing fields, and other outdoor sports areas

- v. amenity green space (most commonly, but not exclusively, in housing areas) – including informal recreation spaces, green spaces in and around housing, domestic gardens and village greens
- vi. provision for children and teenagers – including play areas, skateboard parks, outdoor basketball hoops and other more informal areas (eg, 'hanging out' areas, teenage shelters)
- vii. allotments, community gardens, and city (urban) farms
- viii. cemeteries and churchyards
- ix. accessible countryside in urban fringe areas
- x. civic spaces – including civic and market squares, and other hard-surfaced areas designed for pedestrians

3.2 The project manager and parks and open spaces managers should decide which parts of the parks and open spaces services as defined above will be included. The self-assessment covers all the functions involved in delivering these services (regardless of which department they are in).

3.3 The exact scope of your self-assessment will depend upon the nature of your services and organisation. However, the following principles should be applied:

- i. The potential value of the self-assessment grows as the scope widens; this has to be balanced against the increasing time and complexity.
- ii. When deciding which services will be included, view the service through the eyes of the customer, rather than from the perspective of your organisation's structure: avoid including a green space and leaving out the activities taking place within that space (eg, play facilities, events, etc).
- iii. Include all local authority functions involved in delivering the identified services, even if they fall into different departments (eg, the sport and recreation department); remember to include the support functions (eg, finance and HR departments).
- iv. Include grounds maintenance contractors and sport and recreation contractors where these are involved in parks and open spaces services.
- v. Some organisations include other external partners in the scope; consider the benefits of this, bearing in mind the added time and complexity. Partners outside of the scope can still input through surveys and consultation, etc.
- vi. Ensure that all of the functions included in the scope of the self-assessment are represented on the self-assessment team; this team will collectively assess how

well all of the different functions are working together to deliver, develop and improve the service.

- vii. You do not need to assess all of the functions/organisations in the scope against all eight TAES Themes; for example, you might only assess the ground maintenance contractors against 'Standards of Service' or the council finance department against the first three criteria in 'Use of Resources'. You could have different self-assessment teams for each theme.
- viii. Note that the functions included in the scope of the self-assessment are known throughout the TAES documentation (including this document) as **the organisation**.
- ix. Throughout this process of defining the scope, remember to keep the end in mind: the success of the approach can only be judged by how the organisation improves.

3.4 Having established the scope of the self-assessment, It is also necessary and extremely valuable to define:

- Who are the leaders (these are not necessarily just the managers)?
- Which external organisations and agencies are involved in a structured partnership with the organisation to develop and deliver the services?
- For whom are the services provided? (NOTE: an important part of continuous improvement and excellence, and an area which often attracts criticism to the public sector, is clear identification of the customers and what services they will receive.)
- What outcomes will be achieved as a result of the services?

3.5 The template at the end of this document will help you to develop a clear scope and to define key terms to be used in the self-assessment.

4. Establishing the self-assessment team

- 4.1 The self-assessment team or teams will be responsible for reaching a **consensus** view on strengths, areas for improvement and judgements relating to each theme and for planning improvement projects.
- 4.2 Self-assessment is essentially a management tool designed to inform the organisation's service plans; therefore, representatives of the organisation's management team should be included in self-assessment teams. In order to obtain a complete picture of the way the organisation operates and to develop ownership of improvement activity, other staff could be included.
- 4.3 It is recommended that self-assessment teams contain no more than 10 members, as consensus decision-making becomes increasingly difficult to manage and time-consuming as teams grow in size. Team members could be asked to represent the perceptions of other people in the organisation.
- 4.4 It is important to establish a self-assessment team leader, who will lead and facilitate the consensus discussions and improvement planning. This will not necessarily be the senior manager; it is often the person who has expertise in the TAES Framework, Self-Assessment and improvement planning, a specialist facilitator or an external coach. It is also valuable to include a 'challenge agent' in the self-assessment team. This could be the self-assessment team leader, a person from another department, a neighbouring authority, the county sports partnership or an external partner.
- 4.5 A person should be given the role of recording the judgements, strengths, areas for improvement and the organisation's current practices. A record sheet template is included in section 4.

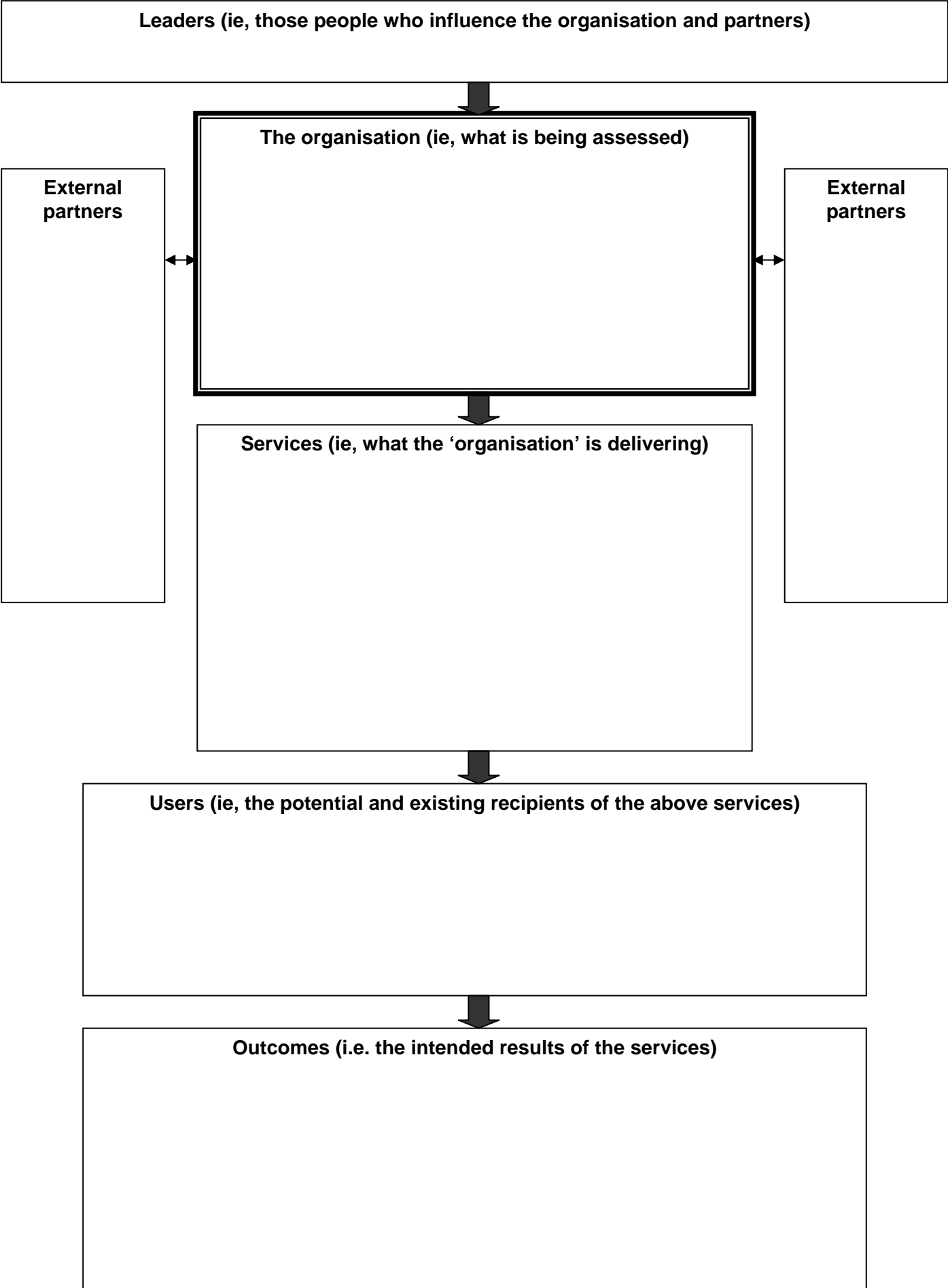
5. Collecting the evidence

- 5.1 The TAES Self-Assessment is designed to be evidence-based. This means that the self-assessment team should consider what formal approaches the organisation has in place or planned and what documentary evidence supports this perception. TAES is not designed to be a paper-chasing, box-ticking or window-dressing exercise: extra documents do not have to be created 'because of TAES'. The existing

documentation enhances and substantiates the self-assessment team's perceptions of the organisation's approaches in relation to the TAES Criteria.

- 5.2 Some of the judgements require an analysis of people's perception about the organisation. For example, judgements about leadership will require a view from staff across the organisation as well as from the most senior managers; some of the judgements on partnership working will require a view or assessment from the various partners; some of the judgements about standards of service will require customers' views (as defined in the scope). These perceptions could be obtained from surveys, focus groups or interviews. These questions should be specifically designed to suit the audience and to obtain comprehensive feedback on the services provided. Example templates for partner and staff feedback can be found in sections 9 and 10 respectively. Existing feedback should be used where possible, providing the source and information is fit for purpose and objective enough to base a judgement on. In some cases the self-assessment team's perceptions could provide sufficient evidence. It is important to remember that this feedback is not necessary 'because of TAES Self-Assessment' – it is part of the normal operation of any successful organisation and should be obtained and used even if the organisation is not carrying out a formal self-assessment.
- 5.3 A member of staff should be given the responsibility for collecting critical documents (eg, the organisation's strategy and feedback trends) and making them available during the self-assessment sessions (this does not mean producing the documents). The evidence relating to each criterion should be noted during the self-assessment. Many documents will be applicable to more than one theme.

TAES Scoping and Planning Template



TAES Scoping and Planning Template

Theme	Functions will be included in the self-assessment (eg, grounds maintenance, landscape design, finance department, etc)	Self-assessment team members	Team leader, challenge agent and scribe	Meeting dates
Leadership				
Policy and Strategy				
Community Engagement				
Partnership Working				
Use of Resources				
People Management				
Standards of Service				
Performance Measurement and Learning				